



Tips for Using Product Templates

This document provides a few useful tips for creating and formatting basic word documents in the State Capacity Building Center templates. If you need support that goes beyond this document, please email OCCInfoServices@icfi.com

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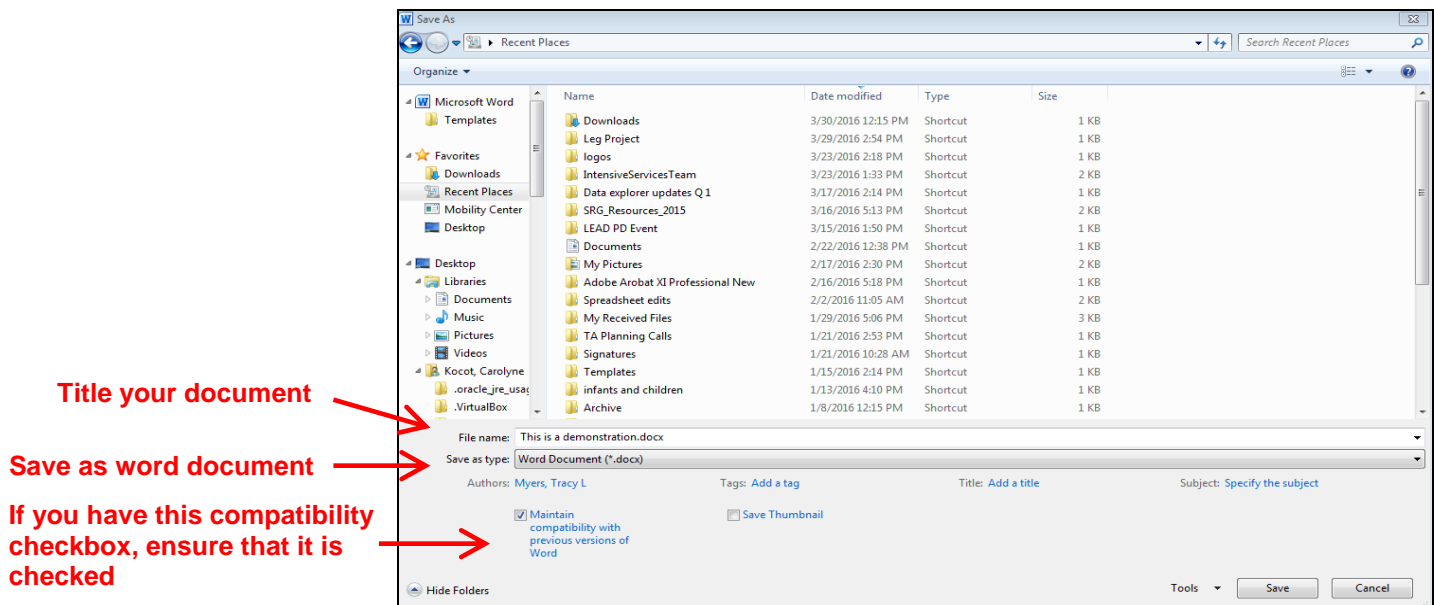
Tip 1: Build Your Document in the Template

If you are creating a new document, we encourage you to build your document using the SCBC templates. It is easier and more efficient to create the document in the template, rather than transferring the content into the template later in the process. If you need to transfer a document into the template, please see Tip 5, “Paste Carefully,” for more information and contact the Information Services team if you would like more in depth assistance.

Tip 2: Save as a Word Document and Ensure Compatibility

There are a few things you should do right away in order to avoid formatting issues with your template document. Please follow the steps and screen shot below when you start a new document:

- ◆ Locate the template on the Capacity Building Center workspace [here](#). We will update the template periodically, so using this link will ensure that you have the most current version.
- ◆ Open the template and select “Save As.”
- ◆ Title your document.
- ◆ Switch to document format to Word Document.
- ◆ If you see a checkbox check box that says, “Maintain Compatibility with Previous Versions of Word,” ensure that you check it. **If you do not see this box, your document is already compatible and no action is needed.**
- ◆ Save your document to a location where you can work from it easily (e.g., your desktop, U drive, etc.)

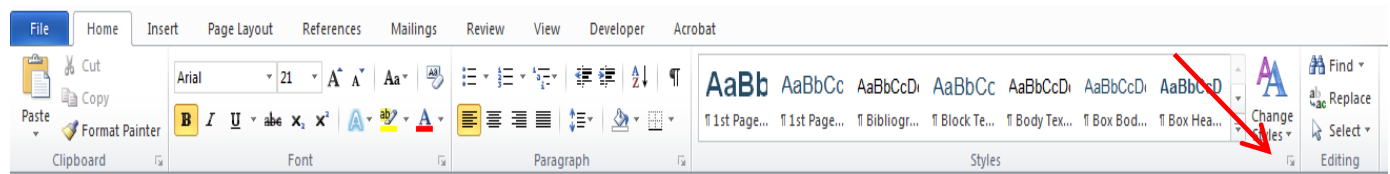


Tip 3: Use Styles

Styles are the predefined formatting rules within the templates. The SCBC templates include styles for all levels of text (e.g., headers at different letters, body text, references, etc.), bulleted and numbered lists, and tables. Applying styles to your document's content ensures that it is formatted consistently according to the rules in the template. Please follow the steps below to use styles in the template:

- ◆ You will notice that the template includes sample text. You may use this sample text as reference as you apply styles to your document, or you can clear the sample text and work from a blank document.
- ◆ Navigate to the top bar and open the styles pane in your document:

In your top bar, click here to open the styles pane



- ◆ The styles pane should open on the right side of your screen. You can change settings within the pane to make it easier to navigate:

Check the “Show Preview” box to display the formatted styles

Click options and this box will open

Under “Select styles to show”, select “Recommended”

Under “Select how list is sorted,” you can alphabetize the styles in the styles pane to make them easier to find

- ◆ **Every** word of text, including tables and lists, needs to be in one of the predetermined styles. To apply a style to your text, select the appropriate style in the styles pane (e.g., Heading level 1) and type your content. When you need to move to a new style, select a new style from the pane and type your content. Repeat as needed.
 - Note that even plain text within the body of the document needs to be in a style. Use the “Body Text” style for this kind of text.
- ◆ If you need to change the style of your content, highlight/select the text you wish to change and then select the style you wish to change it to.

Tip 4: Update your Headers and Footers (twice!)

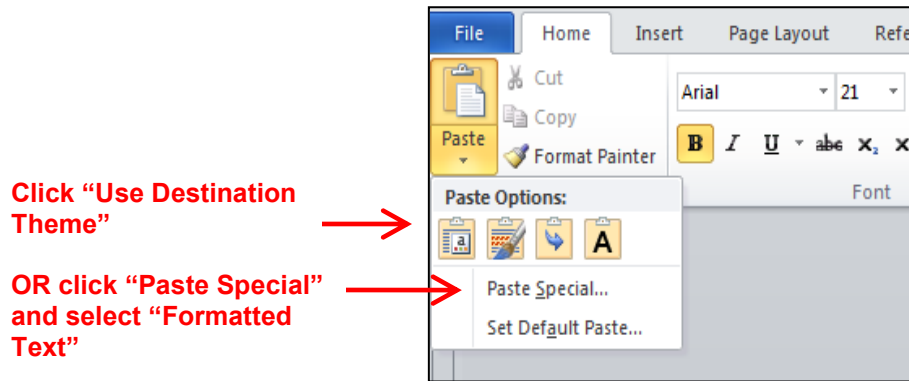
The header and footer on the first page of the templates are different from the header and footer on subsequent pages. Make sure you edit the header and footer on the first page AND the second page.

Tip 5: Paste Carefully

As mentioned in Tip 1, it is much easier to build your document in the template than it is to transfer content into the template. However, if you do need to transfer content from one document into another, there are a few things you can do to make this easier:

- ◆ Copy and paste in small sections.
- ◆ Use one of two methods to paste the content: A) paste as formatted text or B) use destination theme. To do this:

- Copy the text you wish to transfer and then navigate to your template.
- Click in the section where you wish to paste the text.
- Use the paste dropdown in the top left corner to either:
 - Use destination theme
 - Paste special and then select “formatted text”



- ◆ Once you paste your text into the document, highlight/select the text and apply the appropriate style from the style pane. **Even if the text looks formatted, you still need to do this step to make sure you are using the right styles.**
- ◆ Note that if you are transferring content from another document that used styles, those old styles may appear in your new style pane. To avoid using the wrong style, reference the sample text in the template.